REGIONAL INFORMATION FOR ECONOMIC, DEMOGRAPHIC & ENERGY ANALYSIS

Local Development Policy Survey Update for San Francisco

ABAG ASSOCIATION OF BAY AREA GOVERNMENTS

Berkeley, California

LOCAL DEVELOPMENT POLICY SURVEY UPDATE

FOR

SAN FRANCISCO

JUNE 1983

ASSOCIATION OF BAY AREA GOVERNMENTS, BERKELEY, CALIFORNIA

TABLE OF CONTENTS

1. INTRODUCTION

1.1. Scope of Report

The "Local Development Policy Survey Update for San Francisco" is the third in a series of reports on the 1981-82 ABAG Local Policy Survey Update. The survey results are to be used in the development of a new ABAG projections series that will include subregional forecasts of population, households, and employment. The survey updates the land availability assumptions produced in 1976 and used in ABAG's Series 3 and Projections 79 forecasts. Since local development/land use policies change over time, the land supply and density assumptions for Projections '83 need to be based on current rather than 1976 policies.

This report assesses development potential as defined by existing and, in some cases, proposed land use policies in the City and County of San Francisco as of September 1982. Section 2.1. presents background information on the City including major land uses, composition of the housing stock; and recent demographic and employment trends. Section 2.2. summarizes the results of the ABAG survey; while Section 2.3. discusses the survey results in detail, citing specific project proposals and City policies. In the immediately following pages (Section 1.2.) terms specific to the ABAG Local Policy Survey Update are defined.

1.2. Definition of Terms

Because the Local Policy Survey Update is designed to coordinate with other information and studies at ABAG, certain terms need to be defined for the purposes of this study. These terms include the following:

a. Local development policy:

A local development policy is broadly defined as a principle, plan, or course of action that is pursued by a local government and is concerned with the use of land. The term implies both statements of objectives and implementation actions and strategies.

b. Post-1980 period:

The period following April 1, 1980 to the year 2000. "Short-term" implies the 1980-85 period (April 1 to April 1), the 1985-90 period is "mid-term," while "long-term" usually means after April 1990.

c. Residential:

A category of land use corresponding to areas that are occupied by single- and multiple-family homes including mobilehome parks.

d. Local-serving:

A category of land use corresponding to areas occupied by local-serving industry. These industries serve the regional

markets primarily consisting of the local populations. This category often includes commercial and institutional uses but is more accurately defined as land with local-serving employment. Local-serving acreages would include land devoted to:

- retail trade offices;
- churches;
- schools below the state level;
- hospitals;
- local and rapid transit;
- communications and utilities;
- restaurants;
- banks, credit agencies, insurance brokers and agents' offices, and real estate offices; and
- local governments' facilities.

e. Basic:

A category of land use that generally corresponds to industrial uses but is more accurately defined as areas with basic employment. Basic industries are manufacturing industries and those which export products or act as suppliers to other regional industries. Basic acreage would include land devoted to:

- heavy industry;
- food processing;
- high technology manufacturing;
- miscellaneous manufacturing;
- long distance transportation;
- wholesale trade;
- finance and insurance (security and commodity brokers, exchanges, and services; insurance carriers; holding and other investment companies);
- business services;
- schools at the state level (4-year colleges and universities) and museums; and
- Federal and State governments.

f. Mixed Use:

This category refers to land that is not exclusively residential, local-serving, or basic. More than one type of these uses occupies the same site or area, such as a local-serving/residential project with retail services on the ground floor and multiple-unit residential above. While some large-scale development projects may involve several uses, the acreage is considered mixed use only if more than one use occupies the same piece of land. Otherwise, the acreages are identified in one of the exclusive use categories or as open space.

In addition to the terms identified above, other terms are defined in the text as they first occur.

The basic and local-serving land use concepts correspond to ABAG's definition of the Bay Area's economic activities under the economic base concept. Basic acreages are utilized by "basic activities," i.e., those which respond to demand from outside the region and bring income to the Bay Area through the export of goods and services. Local-serving acreage is occupied by "local-serving activities" which respond to demand (from growth in population and income levels) from within the region. Commercial office land uses may be either basic or local-serving, depending on the economic activities of the occupants. If the office employment is associated with basic finance and insurance and basic services (such as accounting, advertising, job placement, and large engineering firms selling services to parties outside the region) or with corporate headquarters of all types of industries which export their services, then the land is categorized as basic. Office development in San Francisco's Central Business District was assumed to be basic. Office employment may also be associated with local-serving services, such as retail and professional.

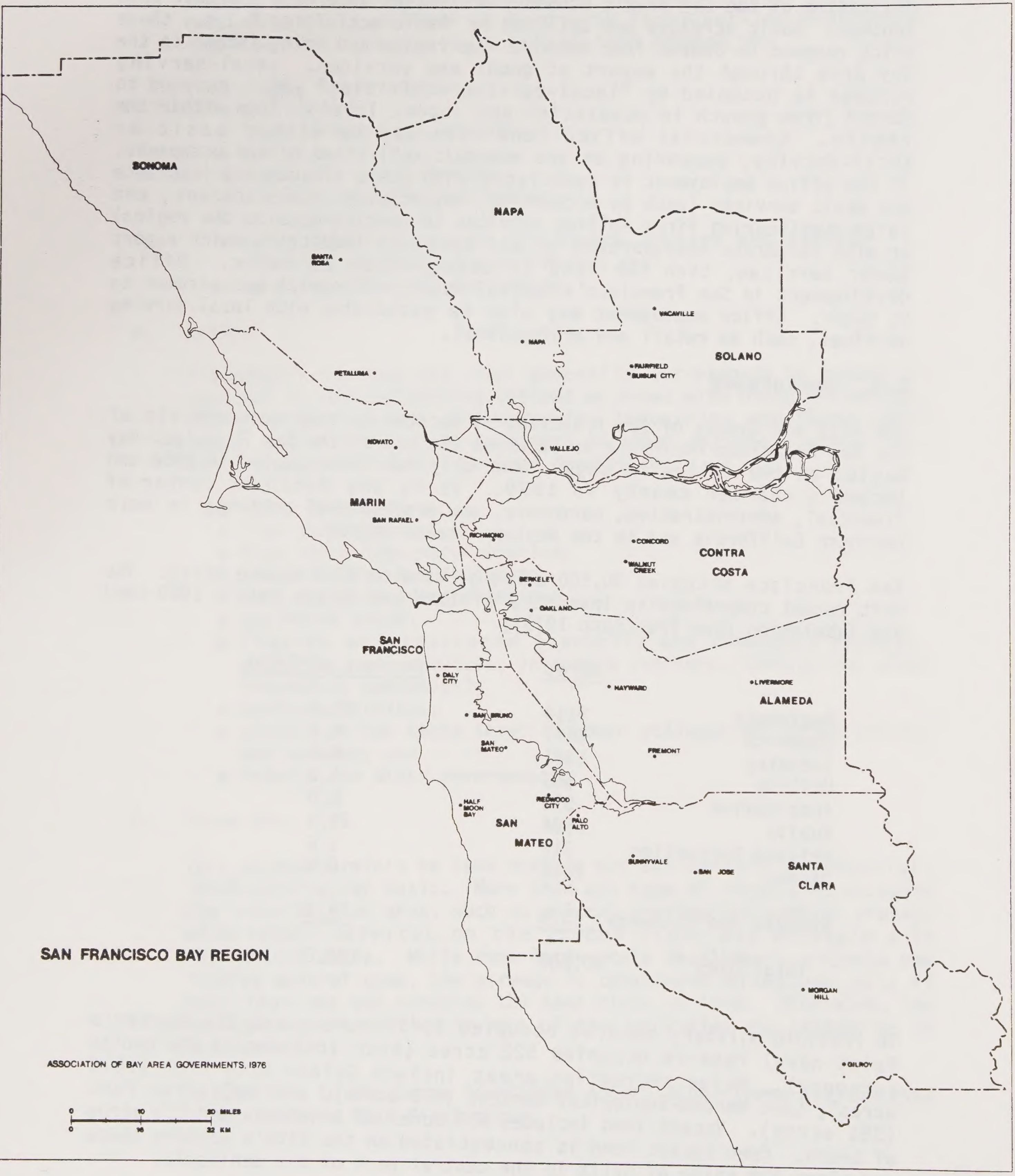
2.1. Background

The City and County of San Francisco is located on the northern tip of the San Francisco Peninsula as shown on the map of the San Francisco Bay Region on the following page. The city was incorporated in 1850 and became a charter county in 1899. It is the dominant center of financial, administrative, corporate, and professional activity in both northern California and in the Western States region.

San Francisco occupies 30,500 acres of land or 47.6 square miles. The most recent comprehensive inventory of land use is the City's 1970 Land Use Tabulation (San Francisco 1973);

	Acres	Percent of Total
Residence	9114	29.9
Commerce	1477	4.8
Industry	1361	4.5
Utility	563	1.8
Institution	596	2.0
Public	7594	24.9
Private Recreation	312	1.0
Vacant	2084	6.8
Streets and Highways	7399	24.3
Total Uses	30,500	100.0

Th Presidio military reserve occupies 1,435 acres, and The Hunter's Point naval reserve occupies 522 acres (both included in the public category). Major recreation areas include Golden Gate Park (1018 acres), Lake Merced-Zoological Gardens (972 acres), and McClarren Park (351 acres). Vacant land includes 950 acres of tidelands and 113 acres of beach. Open vacant land is concentrated on the city's eastern shore and along the spine of hills in the central part of the peninsula.


SONOMA
NAPA
SANTA ROSA
VACAVILLE
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SOLANO
FAIRFIELD
SUISUN CITY
PETALUMA
NOVATO
VALLEJO
MARIN
SAN RAFAEL
RICHMOND
CONCORD
CONTRA COSTA
WALNUT CREEK
BERKELEY
OAKLAND
SAN FRANCISCO
DALY CITY
HAYWARD
LIVERMORE
ALAMEDA
SAN BRUNO
SAN MATEO
FREMONT
HALF MOON BAY
REDWOOD CITY
PALO ALTO
SAN MATEO
SUNNYVALE
SAN JOSE
SANTA CLARA
MORGAN HILL
GILROY
SAN FRANCISCO BAY REGION
ASSOCIATION OF BAY AREA GOVERNMENTS, 1976
0 10 20 MILES
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The April 1980 housing stock of 316,608 units contains approximately one-third single family homes, one-third units in multiple unit buildings of two to nine units, and one-third units in larger buildings. Single family neighborhoods, with densities averaging 11 units per acre, predominate in the western half of the city; higher densities occur on the city's eastern side, especially in the northeastern quadrant. Commercial uses are concentrated in the northeastern corner of the city, while industrial uses flank the city's eastern shore. (San Francisco 1982)

The April 1980 Census counted 678,974 persons living in San Francisco, a decline of 5.2 percent from a total population of 715,674 in 1970. Total households numbered 298,956 in 1980, an increase of 1.3 percent over the 295,174 households counted in the 1970 census. Average household size dropped by 6.4 percent, from 2.34 persons per household to 2.19, over the 1970-1980 period. San Francisco had the smallest average number of persons per household of the nine Bay Area counties in 1980.

San Francisco has experienced significant employment growth during the past decade, in large part due to the expansion of office employment. Between 1970 and 1980, ABAG estimates that the number of jobs in San Francisco increased from 494,129 to 561,402 or 13.6 percent. In the period 1972-1979, San Francisco was the Bay Area's leading office growth center as measured by value of office building permits filed (ABAG 1981). The city's position as a leading financial center, prestige headquarters location, and fertile ground for specialized professional and business services which draw their markets from the entire western region of the country has produced a supply of 39.7 million square feet of rentable office space in both major and small buildings. Nearly all of the office growth has occurred in the Central Business District with notable concentrations of new development immediately south of Market Street.

2.2. Summary Conclusions

The ABAG Local Policy Survey Update identified 843 acres of land in San Francisco that are available for development during the 1980-2000 period. Development potential in the city is primarily associated with the reuse of developed land -- taking an already developed site and replacing the existing use with more intense activity. Of the 843 acres identified, 750 acres or 89 percent involves reuse potential; while only 93 acres (11 percent) clearly represent development potential on vacant sites. More specifically, infill potential was identified for 66 acres. "Infill" is defined as small sites less than 5 acres in size that may or may not have been previously developed. Rebuilding potential was found for 666 acres, with the potential for conversion of existing improvements to another use identified for 18 acres.

Included in the potential reuse of developed land through rebuilding or conversion activity are 129 acres involving shifts from exclusively local-serving uses to residential and mixed use development, primarily in the city's Van Ness Corridor area. Approximately 290 acres of basic developed land could potentially shift to residential and mixed uses. Mission Bay, Rincon Hill, Rincon Point - South Beach, and South of Market areas compose the bulk of the basic land shifts to other uses.

Table 1 presents a summary of this reuse potential according to the planned or proposed land uses (rather than current land uses).

The ABAG survey found that current and proposed local development policies could accommodate at least 43,334 housing units. These estimates do not include all of the scattered vacant lots identified in the City Planning Department's 1979 inventory of housing opportunity sites. These small sites which have not developed to their "zoned potential" have been included in the ABAG survey only when a site-specific, documented reference was made to the more intensive use.

Residential development potential is associated with 403 residential acres and 168 mixed use acres. The 403 residential acres could potentially accommodate 25,175 units for an average density of 62.4 units per acre. In combining residential uses with local-serving and, in some cases, basic activity, another 18,159 housing units could be accommodated for an average density of 108.1 units per acre.

Table 2 summarizes the available land supply by type and by an assessment of its relative availability over time. This staging of the land supply into three time periods is done specifically for ABAG's projections/modeling purposes. The timing of development opportunities does not necessarily imply buildout estimates. Rather, it indicates the supply of land available to receive allocations of population, households, and employment in the five-year projection intervals from ABAG's regional forecasts. The 1980-85 land suply is composed of committed development activity, i.e., projects recently built; approved; or in some cases, proposed and likely to be appproved. The 1985-90 available land supply includes projects or portions of projects that are planned for development during this period and other lands planned for development according to current local policies with no major service infrastructure or policy constraints. The 1990-2000 land supply includes acreages generally planned for development but with a policy or other constraint that precludes their development prior to 1990. In some cases, large-scale projects with planned 15-year buildout schedules are also included in the post-1990 land supply.

In summary, the 1980-1990 available land supply represents relatively unconstrained land. If the 1980-85 land supply is insufficient relative to demand when the projection model is run, then some of the 1985-90 land may be utilized in the 1980-85 projection interval. It is important to note as well that the available land supply may not be entirely consumed during a projection interval, and the remainder may be carried forward into the next five-year interval to become part of the available land supply for that forecast period.

Section 2.3. discusses the post-1980 available land supply in detail and highlights local policies and programs affecting future development in San Francisco.

2.3. Post-1980 Available Land

2.3.1. Residential Land

The ABAG-Survey identified 403 acres with a potential for 25,175 units over the 1980-2000 period. This total includes exclusively residential

TABLE 1

LAND AVAILABLE FOR REUSE IN SAN FRANCISCO

Potential Land Use	Acres of Reuse Potential by Type Infill	Rebuild	Conversion	Total Reuse
Residential	32	338	13	383
Local-Serving	7	32	0	39
Basic	15	120	5	140
Mixed Uses	13	176	0	189
All Uses	66	666	18	750

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February 1983

TABLE 2

AVAILABLE LAND SUPPLY IN SAN FRANCISCO, 1980-2000*

Potential Land Use	Total Acres	1980-1985	1985-1990	1990-2000
Residential	403	117	92	194
Local-Serving	37	24	3	10
Basic	213	190	7	16
Mixed Uses	190	45	85	60
All Uses	843	376	187	280

* The staging of the available land supply into three time periods for ABAG's projection system does not imply precise build-out estimates. See the text for additional explanation.

Association of Bay Area Governments
February 1983

properties only. (An additional 18,159 units are identified as mixed use potential and are discussed later this report). The average density for exclusively residential sites is 62.4 units per acre. The 117 acres (4,842 units) assumed to be available 1980-85 represent projects completed 1980-82, projects under construction, and projects that are approved or proposed for completion by 1985.

The San Francisco Redevelopment Agency's projects represent approximately half of the 1980-85 residential potential. In Hunter's Point, 751 units on 40 acres were identified, while 893 units on 13 acres were identified in Western Addition A-2, and 150 units on 0.6 acres were identified in Western Addition A-1. Additionally, specific projects in other redevelopment areas include Woolf House (0.4 acres 70 units) and Ceatrice Polite Apartments (0.4 acre, 91 units) at Yerba Buena Center, Mariners Village (13 acres, 100 units), and Mei Lun Yuen (1 acre, 185 units). Many of the redeveloped sites had been used for basic or local-serving purposes prior to their existing or proposed residential land uses. Mariner's Village, for example, was formerly naval housing. Other project sites, namely Mei Lun Yuen, were characterized by mixed residential and commercial buildings prior to redevelopment. Still other sites, especially in Yerba Buena Center and the Western Addition, were formerly parking lots. In Hunter's Point, however, much of the development has occurred or will occur on vacant parcels.

Most of the potential 2,240 units identified in the City's redevelopment areas are owner-or renter-subsidized. Mariners Village contains assisted owner townhomes. Mei Lun Yuen, Ceatrice Polite, and Woolf House contain assisted rental units primarily for the elderly. Scheduled projects in the Western Addition include 151 assisted rental units, 29 co-op units, and 863 market rate units. Scheduled projects in Hunter's Point include 301 co-op units, 120 assisted rental units, and 330 market-rate single family homes.

The remainder of the 1980-85 residential land supply is associated with projects on scattered sites. The largest of these projects is Ocean Beach, a 450 unit condominium complex under construction on the 6.8 acre site of the former Playland Amusement Park. Also included is the 394 unit Winterland Condominium complex which is to be built on a 2.6 acre site that presently contains the Winterland Auditorium. There are a number of other projects, all with fewer than 200 units each. Densities on these projects range from 13 to 300 units per acre. Projects include the 6.9 acre (120 unit) Wisconsin St. surplus site, the 1.8 acre (132 unit) former Synannon Facility site, and the 2 acre (123 unit) Foremost site. A number of approved condominium projects north and west of the Central Business District were also identified.

The 1985-1990 available residential land supply is comprised of 92 acres for 8,128 units and is associated with two types of property--surplus school sites and redevelopment/housing opportunity areas. The first type, the surplus public sites that have been rezoned to permit residential uses, includes eight school sites ranging in size from 0.4 to 5.0 acres for 12 to 110 potential units. These public sites are scattered throughout San Francisco and have a combined land area of 12 acres for 416 units. The second type contains the redevelopment areas of Yerba Buena Center and Rincon Point-South Beach, as well as the

South-of-Market and Rincon Hill areas. The 5.9 acres (1,180 units) identified at Yerba Buena represent parcels that are presently uncommitted but are planned for residential units. These parcels are currently temporary parking lots. Rincon Point contains a 1.5 acre parcel to be developed with 500 residential units. Nearby South Beach is to contain 24 acres of residential development with 2,000 residential units. Presently, the sites in Rincon Point-South Beach are occupied by basic land uses.

Rincon Hill is a master planned residential community to be developed in phases from 1985 to 2000. One half of the land area and units, or 14 acres and 1,700 units, have been placed in the 1985-90 land supply. The project site is ringed by freeways and is presently characterized by basic land uses. South-of-Market has been targeted by the City as a housing opportunity area, with a year 2000 potential of 5,440 new units. Subtracting out approved or proposed projects here, 4,600 units at an average density of 70 units per acre have been placed in the 1985-2000 land supply. Half of this acreage (32.8 acres, 2,300 units) is specifically contained in the 1985-90 land supply. This acreage does not correspond to specific sites in South-of-Market; rather, it reflects the number of units that the City suggests may develop in this area. South-of-Market is presently dominated by basic land uses, notably warehousing.

The 1990-2000 residential land supply contains 193.7 acres with a potential for 12,205 units. The land supply contains the two types of properties mentioned in the previous paragraphs in this section. Surplus public sites include those that are presently zoned "public" but are under study for rezoning by the planning department. Included are five school sites, ranging in size from 0.3 to 3.8 acres (5-140 units), with a combined land area of 8.9 acres (255 potential units). Also included is pier 45, an 11-acre port facility which may support 450 residential units.

Redevelopable areas include Rincon Hill and South-of-Market, both discussed earlier. Half of the development potential of these areas has been placed in the 1990-2000 land supply. Also included is Southern Pacific's 153-acre Mission Bay development, tentatively planned for 7,500 residential units. The favored plan for Mission Bay as of September 1982 would allow residential development on approximately 127 gross acres, with office, retail and community facilities occupying the remainder of the site. Mission Bay is currently a railroad yard. It has been placed in the 1990-2000 land supply due to anticipated environmental evaluation delays and the phasing of the development proposal.

The residential land supply tabulated in the ABAG Local Policy Survey represents those sites where residential development is most likely to occur and where the sites could be readily located geographically. Additional development may occur, either through the infilling of small vacant lots or through rebuilding at higher densities on scattered sites around the city. City Planning Department staff suggest that as many as 27,000 additional units may be developed in residential neighborhoods on sites that are not built to their maximum allowable density. Moreover, the City's residence element indicates that 4300 new units may be accomodated on 2,800 vacant parcels throughout the city totalling 422

acres (San Francisco 1982c). The office/housing production program which mandates that developers of office space construct 640 square feet of residential space for each 1000 square feet of office space constructed, may encourage such rebuilding and infull activity. However, since these sites are small or are already developed, it was not possible to quantify their total acreage during the ABAG Survey.

2.3.2. Local-Serving Land

The 37 acres of land available for local-serving development include at least, 24 acres with office development potential. The local-serving development potential is associated with approved commercial developments on small sites and with land within the City's housing opportunity areas that is anticipated to be developed with local-serving uses.

Sixty-five percent of the total acreage is contained in the 1980-85 land supply. This includes 12 acres of planned neighborhood commercial, office, and cultural facilities at Fillmore Center in the Western Addition. Also included are 3 acres in the Hunter's Point central neighborhood area, where churches and shops are to be built on vacant sites at the hilltop. Other local-serving projects include a 2-acre Safeway Store, a 0.5 acre private high school in Yerba Buena Center, a 2-acre shopping center expansion at Stonestown, and the 0.7-acre Neiman-Marcus store on Union Square (recently completed). Most local-serving projects identified in the ABAG survey involve rebuilding activity.

Three acres of land are contained in the 1985-90 land supply. This includes 1 acre of neighborhood commercial development at Rincon Point and 2 acres of neighborhood commercial at South Beach. The 10 acres of land contained in the post 1990 supply are associated with anticipated community-serving development at Mission Bay. Developments at Rincon-Point South Beach and Mission Bay will involve land use shifts from basic to local serving.

City policy encourages the containment of commercial activity to existing nodes and discourages the encroachment of local-serving uses into residential areas. Thus, additional development may occur through rebuilding, conversion, and infill in existing neighborhood commercial centers throughout the city. Land available for such development was not quantified in the ABAG survey.

2.3.3. Basic Land

The Local Policy Survey identified 213 acres of land available for basic development between 1980-2000, including some office development in the city's Central Business District (CBD) but excluding mixed use projects. Of this total supply, 190 acres are assumed to comprise the 1980-85 land supply. This includes 140 acres of new or planned development on vacant parcels near the city's eastern shore and 50 acres of 1980-82 constructed, approved, or proposed rebuilding in the Central Business District. The 140 vacant acres include the 75-acre San Francisco Executive Park and 29.2 acres in the India Basin Redevelopment Area. Also included are 3.4 acres of vacant parcels at the Bayview Industrial Triangle and a 32-acre Postal Service Bulk Mail Facility at India Basin.

The 50 acres in the CBD include 2,098,000 square feet of downtown office space on 5.3 acres completed between 1980-82. Also included are 6 approved hotels on 3.2 acres and 6.5 acres of development proposed for Yerba Buena Center. The 11-acre Moscone Center is included as well. Downtown office development under construction, approved, or proposed totals 7,166,000 square feet and is anticipated to occur on 25 acres of land on scattered small sites. Most of this development is to occur through clearance and rebuilding on built-up basic sites. About 6 acres of the land supply is associated with the conversion of existing structures to office buildings.

Seven acres were identified for the 1985-90 land supply. This acreage represents planned rebuilding activity at Rincon Point, where a tourist-serving hotel is to be built, and at Yerba Buena Center, where vacant acreage master-planned for office buildings remains uncommitted.

The 16 acres contained in the 1990-2000 land supply represent anticipated office development at Mission Bay. Development plans for Mission Bay are speculative at this time; the actual number of acres to be developed with basic offices may change as project development proposals become finalized.

Additional basic development can also be expected to occur between 1985 and 2000 on sites not identified specifically in the Local Policy Survey. New basic development is anticipated to contain:

1. New buildings on scattered vacant parcels in existing industrial districts,

2. Basic office and hotel development in not-yet established redevelopment areas, and

3. Basic office and hotel development on under developed sites in the Central Business District.

Acreage available for this additional development was not quantifiable as of September 1982.

2.3.4. Mixed Use Land

The ABAG Local Policy Survey identified 190 acres of land with potential for mixed use development between 1980 and the year 2000. Mixed use sites include 141 acres of combined residential and local-serving uses; 9 acres of residential combined with basic; 22 acres of basic and local-serving activities; and 18 acres of residential, basic and local-serving uses on the same site. Seventy-two percent of the land area includes office development potential. Residential was found to be the primary use for 78 percent of the land area, while basic land uses are likely to dominate on 22 percent of the land. The most frequent secondary use was local-serving.

The 1980-85 mixed use land supply contains 45 acres. Most of this acreage is associated with developed sites of less than one acre. Approved and proposed mixed use projects are generally in the vicinity of the CBD and contain either residential uses above office and/or retail uses or office uses above retail uses. Combinations of

residential, basic, and/or local serving development on the same sites compose 24 acres of the supply. Associated with this acreage are 3,030 housing units and 3,081,000 square feet of office and retail space. Included in this category are such projects as Golden Gateway Commons (6.5 acres), Opera Plaza (2.4 acres), and Welsh Commons (1.5 acres).

The remaining 21 acres contain sites that are to contain basic office space above ground floor retail establishments. Approved, proposed, or 1980-82 constructed projects in this category contain 10,190,000 square feet of office and retail space. Included are such projects as Embarcadero 4 (1.5 acres), Pier One (1.0 acre), and the Crocker Bank and Galleria (3 acres).

The 1985-2000 land supply contains 145 acres (15,129 units) of potential mixed use development. This supply is concentrated in five redevelopable areas identified by City staff. The first, the Van Ness Corridor, is under study to be rezoned to permit mid-rise residential office retail structures along the boulevard; 84 acres of development potential, with 10,600 housing units, were identified here. Second, the Fillmore Center was identified as having 4 acres planned for mixed commercial-residential development including 166 housing units. The third area, North-of-Market, was found to contain 31.4 acres of mixed use development potential with 2,198 housing units.* This potential assumes replacement of older residential-local serving structures with newer, but similar, developments. Fourth, the Central Business District was found to contain 5.1 acres with 510 potential housing units. This acreage represents sites that are presently undeveloped with potential for residential-office-retail buildings. Fifth, Yerba Buena Center contains 10 acres of land that is master planned for residential-office hotel-retail structures. As many as 800 potential housing units are associated with these properties, which are currently vacant and uncommitted to specific projects.

Also identified in the survey were 9.6 acres (855 units) at three Muni bus yards for the post 1990 period. The possible development of housing in the air rights above these facilities is currently being explored.

Additional potential for mixed use development may exist on small sites throughout the city. However, such potential was not quantified during the survey.

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* The number of units for North-of-Market, the CBD and Yerba Buena Center was derived by subtracting approved or proposed units (1980-85 land supply) from the unit potential identified in City plans. Acreage was derived by computing an average density, based on approved or proposed projects in each area.

2.3.5. Service and Local Policy Considerations

The availability of urban services generally does not pose a constraint to future development in San Francisco. Water and sewer services are available to all developable parcels in the city. Sewerage facilities are presently being upgraded to provide higher levels of wastewater treatment. Anticipated capital improvements include the realignment of the Great Highway, the improvement of the Cable Car System, the extension of the Muni Metro, the removal of the Embarcadero Freeway, and improvement of the waterfront.

San Francisco's policies toward future development reflect a concern for balancing commercial, industrial, and residential growth while maintaining the city's character and unique qualities. The City has taken a number of measures to ensure the attainment of these goals. Neighborhood Improvement Plans have been prepared for much of the city, including Chinatown, Visitacion Valley, and the Cortland Avenue area. Urban Design guidelines are addressed in "Guiding Downtown Development" (1982), and the cumulative impact of CBD hi-rises has been examined in the "Downtown EIR." The Northeastern Waterfront Plan calls for improvement of the City's port facilities and encourages the creation of new blue collar jobs.

The 1982 update of the City's residence element includes a number of development policy changes, each aimed at increasing the availability of housing. Nine objectives are stated, and policy changes are outlined for each. Objective 1 calls for the provision of housing for all income groups. New policies encourage the development of housing on underused public lands, the conversion of underused commercial and industrial land to residential use, and the selective encouragement of mixed use developments and secondary units. Objective 2 seeks to increase housing supply while preserving neighborhood character. New policies to achieve this objective encourage the construction of smaller housing units and the allowance of higher densities. Objective 3 encourages the retention of the existing housing supply. This is to be attained by discouraging demolition, regulating apartment conversion, and preserving residential hotels. Policies to implement the fourth objective, the improvement of the physical condition of housing, are unchanged from 1975.

Objective 5, the provision of affordable housing, includes new policies to increase the supply and reduce the cost of low and moderate income housing. New policies also include incentives for inclusionary housing, provisions for prefabricated housing and mobile homes, and the encouragement of non-profit housing corporations. Policies to implement the sixth objective, the provision of a quality living environment, are unchanged from 1975. Objective 7, which seeks to maximize housing choice, includes new policies to eliminate discrimination against children and to encourage new rental housing. The eighth objective, to avoid or mitigate displacement hardships, is not accompanied by major policy changes. Finally, Objective 9, which calls for a coordinated regional approach to address housing needs, includes a new policy that encourages the balance of growth and housing.

Revisions to San Francisco's residence element address the growing imbalance between job and housing growth in San Francisco. The construction of office buildings generates housing demand, while housing

supply is constrained by the shortage of developable land and the escalation of housing costs. In response, the City's Office/Housing Production Program (OHPP) requires the construction of 640 square feet of residential space for each 1,000 square feet of office space constructed. This interim control, adopted by the Planning Commission, includes multiple credits for affordable housing and the substantial rehabilitation of older buildings. Housing credits may also be received through developer investment in a city-wide mortgage revenue bond program. The City hopes to achieve a target of 2000 housing units per year by 1985. Provision of these units is to be stimulated through the OHPP and through the rezoning of Mission Bay, Rincon Hill, and Rincon Point-South Beach.

Future local-serving development will be affected by the City's 1982 proposal to change the zoning standards in neighborhood commercial districts. The new zoning framework would replace existing classifications with new controls tailored to each of the city's commercial districts. Permit processing would be expedited through an abbreviated conditional use review process. Objectives are to maintain existing commercial districts by encouraging their accessibility, to maintain the traditional mixed use composition of commercial districts, and to promote quality urban design in commercial areas.

Future basic development will reflect downtown controls and guidelines which regulate building size, design and appearance. Guidelines also encourage the inclusion of retail services in office buildings, the provision of public open space, the improvement of transit and pedestrian circulation, and the preservation of historic structures. Guidelines are integrated with policies to provide additional housing and policies to maintain industrial areas. The potential short-term addition of 23 million square feet of office space in the Central Business District prompted the preparation of the "Downtown EIR." This study examines alternatives for the future of the CBD. These alternatives include a moratorium on hi-rise development, a proposal to limit office growth to 1.8 million square feet annually, the existing planning code regulations, and a proposal developed by the Chamber of Commerce.

Continued industrial and maritime development is encouraged in the policies and objectives of San Francisco's Commerce and Industry element, the Northeastern Waterfront Plan, and in plans developed by the Port of San Francisco.

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